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ABSTRACT

Reform of New Zealand schools has been ongoing since 1988, when the Task Force to Review Education Administration recommended devolution of managerial control, within national guidelines, for each of the country's 2,700 state school boards of trustees with a majority of elected parents' representatives. Reforms instituted since 1989 across all sectors of New Zealand's education system can be set within a context of economic and governmental reforms since 1985. Reforms are analyzed from within public-choice theory, principal-agent theory, and managerialism for links to a New Public Management (NPM) model. Greater self-management for tomorrow's schools has been accompanied by greater governmental specification of desired outputs and increased accountability. Schools and their boards must comply in particular with the Education Act (1989), the State Sector Act (1988), and the Public Finance Act (1989). The tasks and dilemmas facing boards and educators in 1989, 1993, and 1997 are described. There is an ongoing tension between equity as a goal and choice as a means to responsiveness and effectiveness. Some 1997 modifications to the NPM model are recorded. Contains an abstract, three appendices containing national education guidelines, curriculum timelines and policy directives. (Contains 47 references.) (Author/MLH)

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WHAKARITORITO TE TUPU O TE HARAKEKE - GROWING THE FLAX SHOOTS: POWER-SHARING IN EDUCATION AND DILEMMAS AND IMPLICATIONS FOR NEW ZEALAND SCHOOLS

Tungia te ururoa kia tupu whakaritorito te tupu o te harakeke: Set the overgrown bush alight and the new flax shoots will spring up.

Ken Rae, Senior Policy Analyst, Education Management Policy Section, Ministry of Education, P O Box 1666, Wellington

A paper prepared for the Second International Conference of the South African Education Law and Policy Association held at Stellenbosch 18-20 September 1997

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Abstract

Thorough-going reform of New Zealand schools has been ongoing since 1988 when the Task Force to Review Education Administration recommended devolution of control of the management, within national guidelines, for each of New Zealand's 2700 state schools to boards of trustees with a majority of elected parents' representatives.

Reforms instituted from 1 October 1989 across all sectors of New Zealand's education system can be set within a context of reforms since 1985 to the New Zealand economy and to its state sector. They are analysed from within Public Choice Theory, Principal-Agent Theory and Managerialism for links to a New Public Management (NPM) model. Greater self-management for Tomorrow's Schools has been accompanied by greater specification from the state of the desired outputs and increased accountability.

Schools and their boards and staff must comply in particular with the Education Act 1989, the State Sector Act 1988 and the Public Finance Act 1989. The tasks and dilemmas facing boards and educational professionals in 1989, in 1993 and in 1997 are described, and the support and the growing body of research available to assist them in their decision making. An ongoing tension is suggested between equity as a goal and choice as a means to responsiveness and effectiveness. Some modifications in 1997 to the NPM model are recorded.

INTRODUCTION

The theme of the conference is power sharing and the dilemmas and implications for schools flowing from that policy. The title derives from a *whakatauki* or proverb of Aotearoa/New Zealand's *tangata whenua* (the first people of the land), the Maori who arrived from their ancestral homeland across the South Pacific, from about 1000 years ago. The Maori population has been estimated to have numbered 200,000 in 1840, the year of the signing of the Treaty of Waitangi, the founding document of the New Zealand nation, by Maori chiefs and a representative of the British Crown *(Orange, 1987, page 7)*. Today a resurgent Maori population constitutes more than 14% of a New Zealand population approaching 4 million.

Cut from the outside of the plant, the leaves of the flax bush properly processed provided the Maori with fibre for woven clothing, with lines for fishing and for bird snares, and with strong lashings for houses and canoes. Fresh leaves provided material for disposable dinner ware. Carefully dried the leaves provided durable *kete* or baskets. The flower stalk growing from the centre of the bush provided a food source and singing platform for *tui* (the parson bird) and *korimako* (the bell bird).

Flax bushes are sun-loving and don't mind wet feet. They thrive on the banks of rivers and on the edges of the forest. To promote their growth the overhanging bush must be cleared away. Since the arrival of the *Pakeha* (New Zealand's non-Maori population which is predominantly British in origin), clearings in the forest and along the forest edge are likely however to be invaded by exotic and noxious plants, notably the rampant gorse and the entangling blackberry.

The imagery of the *whakatauki* is therefore suggestive at several levels as we contemplate New Zealand's education reforms, or restructuring, with their reallocations of power and responsibility and accountability. The reshapings have not been without implications, dilemmas, increased workloads, and in some cases demanding struggles, for those charged with leadership in New Zealand schools, the trustees who are predominantly the elected representatives of the parents, and the principals.

More than sixty per cent of New Zealand primary schools have seven teachers or less with a teaching principal. The primary principals organisation in late 1996 commissioned a report from *Dr Cathy Wylie (1997)* of New Zealand Council of Educational Research on 'The Role of the Primary Principal Within a Decentralised Education System'. She reported in March 1997 that educational leadership, the most important part of the principal's role, now includes guidance, advice and motivation for the parents on the school's board of trustees as well as for the school's teachers.

Management of the school's roll, its reputation, and its buildings and grounds are now more central to principals' work and concerns than they were before decentralisation. Dr Wylie reported that primary principals workloads have increased by 10% since 1989 and now average 59 hours per week.

Three checkpoints are proposed for an examination of power sharing in New Zealand and the implications - 1989, 1993 and 1997. ***1989*** was the year of building expanded foundations at school level for the management of New Zealand's schools, at great speed and while those beyond the schools could hear only the thud of the demolition team's swinging ball. The Government response to the April 1988 report of the Task Force to Review Education Administration *(The Task Force, 1988)* was a white paper in August, 'Tomorrow's Schools' *(Lange, 1988)*. That paper provided a blueprint by which no organisation beyond the level of the school was to emerge unchanged on the other side of 1 October 1989. The overhanging forest was cleared away by Prime Minister Lange, who was also Minister of Education in the fourth Labour government, as new structures were organised at 'the flax roots', to take over significant responsibilities at the end of a mere 18 months transition.

The year ***1993*** was a year of peak pressure for total adoption of a new model, with political will on the part of the new Minister of Education, Dr Lockwood Smith, backed by the National Government's massive parliamentary majority from the 1990 election. There was an increasing emphasis on an education market as the means to school responsiveness and improvement. Developments were in train to build on the initial model of the self-managing school with waves of curriculum and assessment reforms.

Major restructuring had spread also into the tertiary sector, with a shift to student-driven funding, and an increased private contribution to the costs of a tertiary education on the part of the students or their families, a student loans regime replacing an earlier emphasis on student allowances. The election at the end of the year brought however political stalemate and school level resistance then slowed the pace of change. Blackberries were springing up and some aggressive gorse was apparent.

This year, ***1997***, with New Zealand's first MMP (Mixed Member Proportional representation, a German model) coalition government in place, is very much a year for stocktaking, while still moving forward in the face of broad societal change. The formal Coalition Agreement provides for a range of reviews of the emergent patterns in education of recent years. Hon Wyatt Creech, continuing as the Minister of Education after replacing Dr Smith in March 1996, has confirmed his policy of seeking to relieve pressures on the sector, while at the same time wishing to equip schools and the other institutions to meet major challenges. These challenges are the ongoing social, economic and cultural change (a constant since the mid-eighties) and the renewed demographic growth in the school age population (a factor exercising central policy makers only since 1993, but a pressure throughout the reforms on the schools of the growth areas between Auckland and the Bay of Plenty). The intention is to free flax roots from entangling blackberry and to trim some aggressive gorse.

This paper is a participant's perspective, an exploratory view shaped by the writer's involvement within regional offices of the Department of Education prior to 1990, and ongoing involvement since then within the Education Management Policy Section of the New Zealand Ministry of Education. The section is concerned with policy development in the field of 'systems and structures', the legislative framework at the national level and governance structures at local level.

From an involvement pre-1990 with school managers, of secondary schools in particular, together with some community level special projects, the writer has become increasingly involved in negotiations with the three control departments - Department of Prime Minister and Cabinet, the Treasury and the State Services Commission, the monitoring departments such as *Te Puni Kokiri* (Ministry of Maori Development) and the Ministry of Youth Affairs, and other education agencies such as the Education Review Office and the New Zealand Qualifications Authority, in the preparation of policy advice for the Government. Duties have included supporting the Minister in the House during debates on legislation and servicing the Select Committee's consideration of legislation after its introduction.

The paper is however not to be taken as a Ministry perspective, nor as the policy of the Minister of Education.

THE NEW WORLD OF 1989 - SOME THEORETICAL UNDERPINNNINGS

In July 1987 the review task force chaired by Mr Brian Picot, a prominent businessman and a member of the Auckland University Council, was required:

'To examine:

- the functions of the Head Office of the Department of Education with a view to focusing them more sharply and delegating responsibilities as far as is practical;
- the work of polytechnic and community college councils, teachers college councils, secondary school boards and school committees with a view to increasing their powers and responsibilities;
- the Department's role in relation to other education services;
- changes in the territorial organisation of public education with reference to the future role of education boards, other education authorities and the regional offices of the Department of Education;
- any other aspects that warrant review.'

(Task Force Report, 1988, page 1)

The terms of reference reflected advice to the Government from the control departments, the Treasury and the State Services Commission, and suggested an agenda of deconstruction at the centre and at regional levels, and devolution of powers to the level of the institutions' governing bodies. The Task Force reported in a manner reflecting its terms of reference.(**Figure one**). It discerned faults in the administration of education in New Zealand: complexity, over-centralisation, lack of information and choice, lack of effective management practices, and feelings of powerlessness. It commented unfavourably on the absence of priorities, accountability, the incentive to manage and effective financial planning *(Ibid, pages 22-35)*. It proposed the school as 'the basic unit' for the new system, a board of trustees as the means of creating a 'partnership between educational professionals and the community', and a charter as 'the lynch pin' to act as a contract between the board and the community and the board and the central government *(Ibid, page xi)*.

Eighteen months later state schools moved to a radical new model of devolved 'self-management within national guidelines', with the Education Act amended just in time on 29 September 1989. (Parallel reform agendas in tertiary and early childhood education had been pursued by a similar pattern of task force enquiry and white paper. The early childhood reforms were also implemented from 1 October 1989 - the tertiary reforms instituted by a further amendment to the Education Act in July 1990.)

Governance within the requirements of a charter undertaking signed with the Minister of Education became the responsibility of each school's board of trustees. The board consists in the main of parents' representatives who are elected for a three year term, joined with the principal who is also in law the board's chief executive officer, a staff representative and a student representative in schools offering secondary education. Boards had the power to co-opt a limited number of additional members, to better

Figure one

Recommendations of the Picot Report

- *the establishing throughout the land of single-school boards elected by parents, with powers of governance and the appointment of staff, a structure long known in secondary education but a bold initiative in the primary sector, the more so given the size of a majority of primary schools;*

- *the bulk funding of the boards, with responsibility on them to adopt a budget on the recommendation of the principal, who as a member of the board in the role of manager entered into a new relationship with the staff;*

- *the passing to the board of responsibility within nationally negotiated industrial awards for setting up a personnel policy which conformed to the 'good employer' and 'equal opportunity' criteria of state sector industrial relations legislation;*

- *the charging of each board with responsibility for maintenance and minor capital works;*

- *the complete removal therefore of property supervision, personnel, finance, and professional guidance roles of education boards and regional offices of the Department and their removal from the scene;*

- *at the centre a fined-down Ministry, and clear separation of policy makers from deliverers of 'services';*

- *the knitting together of centre and periphery, to meet concerns for national comparability and equity for disadvantaged groups, by the device of the Charter, a schedule of agreed school objectives within National Guidelines, seen by the task force as a 'lynch pin';*

- *the achievement of quality assurance by an independent Review and Audit (sic) Agency, charged with measuring the educational and managerial achievements of schools against their Charter objectives by school visits every two years; and .*

- *two safety nets to allow discussion and negotiation without fallout - at district level Community Education Forums able to make representations to the Ministry and at national level a Parents Advocacy Council able to report to the Minister on the one hand or advise parents on issues such as home schooling on the other.*

-Rae 1991

reflect community composition, or after a 1991 amendment to the Education Act, to secure management expertise.

At the centre a fined down and more focused Ministry of Education replaced the former multilateral Department of Education. It was joined by the Education Review Office, a separate department of state charged with auditing schools' performance against their charter requirements, and a range of single purpose agencies - such as the Special Education Service, the Teacher Registration Board, and from 1990 the New Zealand Qualifications Authority.

It should be noted that one of the two bulk grants proposed by the Task Force, for school operations, was developed in preliminary form by June 1989, and managed by the boards from the start of the 1990 school year. The bulk funding of teacher salaries was however put on hold for twelve months, because of difficulties of implementation, in particular the devising of a transitional arrangement to cope with 'winner' and 'loser' schools in any move to a pupil-based formula. In the face of opposition, particularly but not entirely from the teacher unions, a three year trial for volunteer schools was initiated by Government decision only in 1992, and further volunteer boards invited to join in 1996. At the end of 1996 274 schools, 10% of all state and integrated schools, had opted to be directly resourced for teachers salaries.

In 1991 in a time of fiscal crisis and significant downsizing of the central agencies the Parents Advocacy Council was disestablished. In that year also the Community Education Forum, a structure proposed for the resolution of district issues, was made an optional rather than an obligatory step in any restructuring by the Minister of a district's schooling provision. By 1991 the legislative framework was noteworthy for an enrolment scheme regime to cope with situations of pressure on school accommodation that was determined by the boards of individual schools. There was increased provision for private providers in all three sectors.

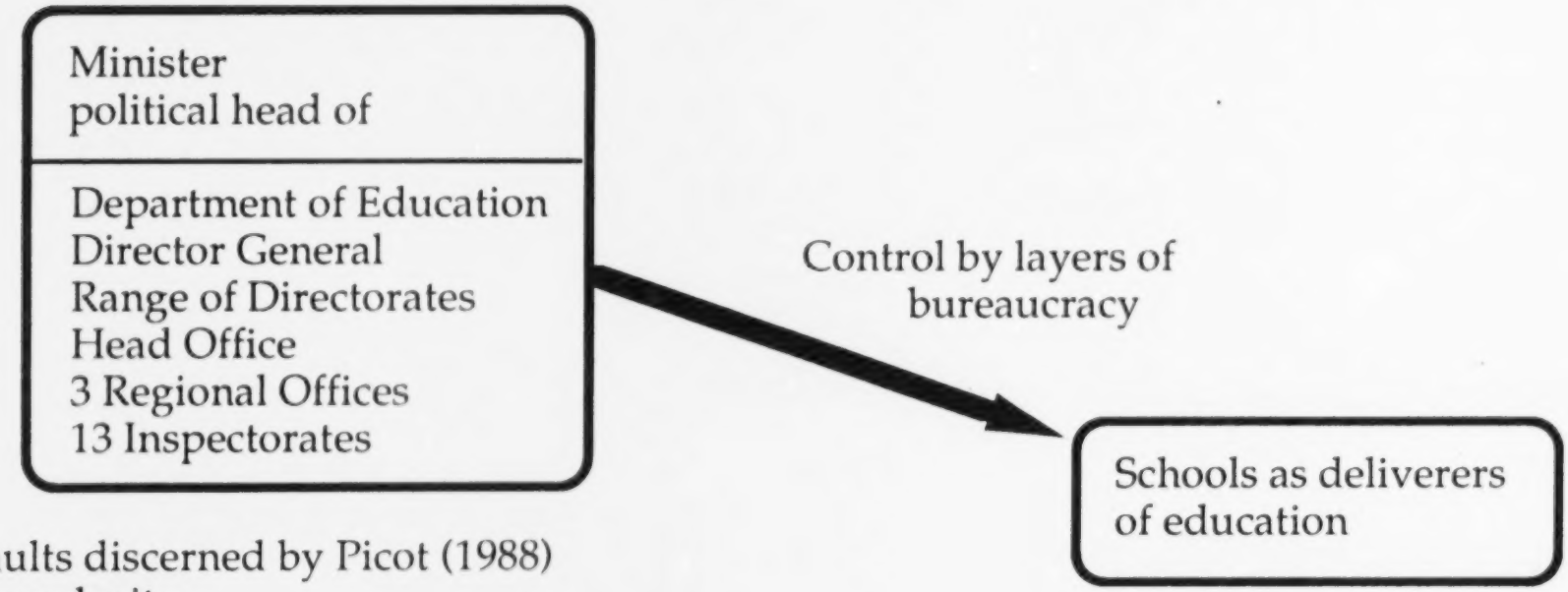
There was also statutory provision for providers with a Maori *kaupapa* (philosophy and ethos) at school *(kura)* and tertiary levels *(wananga)* and full access at early childhood level to state funding for *Te Kohanga Reo*, the Maori language nests. There were 43 *Kura Kaupapa Maori* in 1996, and three *Wananga*. More than two thirds of Maori children were in pre-school and half of those (36%) attending *Kohanga Reo (Rae, 1996c)*. Many private training establishments (PTEs) providing post-school and pre-employment programmes had a base in Maori community organisations.

The pre-1989 and the post-1989 administration structures are outlined in **Figures two** and **three**.

Reform of New Zealand's education management can be set within the wider context, of state sector reforms in the New Public Management model (NPM) and of the 'liberalisation' of the New Zealand economy. Both initiatives had been proceeding since 1985, with increasing momentum after the change of government in late 1990. Implementation of the NPM model has been analysed by *Boston (1991)* in terms of Public Choice Theory, Principal-Agent Theory, and Managerialism.

Figure two

Education Administration in New Zealand pre 1990



Faults discerned by Picot (1988)
Complexity
Overcentralisation
Lack of information and choice
Lack of effective management practices
Feelings of Powerlessness

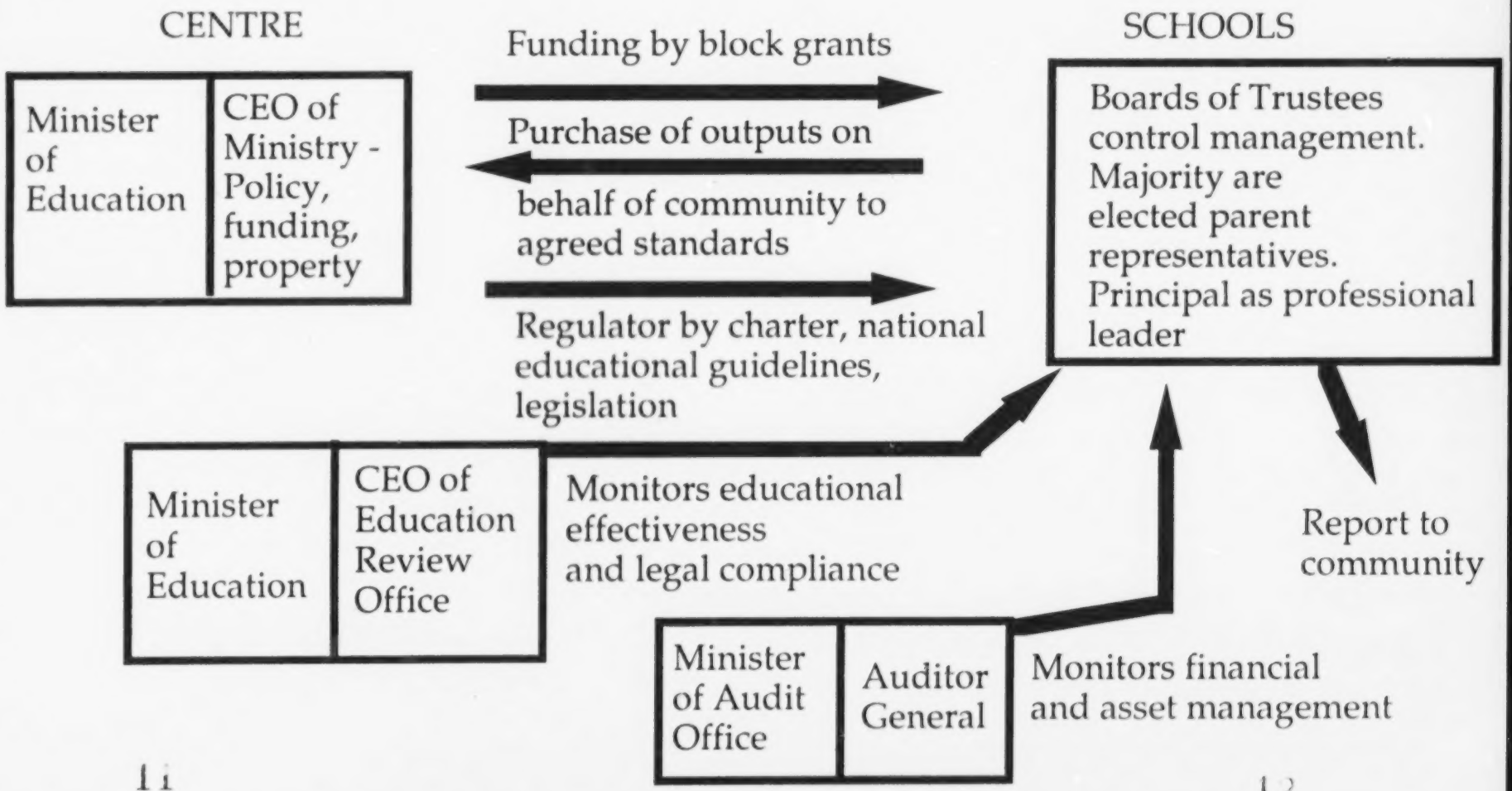
Absence of priorities, accountability,
incentive to manage, effective financial planning

Local input
limited in school committees,
education boards,
in boards of governers greatest

Figure three

Education Administration in New Zealand post 1989

State is funder/owner; purchaser of education services; regulator of standards


CENTRE
Minister of Education
CEO of Ministry - Policy, funding, property
Funding by block grants
Purchase of outputs on behalf of community to agreed standards
Regulator by charter, national educational guidelines, legislation
SCHOOLS
Boards of Trustees control management. Majority are elected parent representatives. Principal as professional leader
Minister of Education
CEO of Education Review Office
Monitors educational effectiveness and legal compliance
Report to community
Minister of Audit Office
Auditor General
Monitors financial and asset management

Public Choice Theory posits self-interest as the motivator of human behaviour, of 'rational economic man' *(sic)*. This generates concepts of 'provider capture', 'the rent-seeking bureaucrat', 'contestability', 'extension of market disciplines' and 'the minimalist state'. *Principal-Agent Theory* derives from concepts of 'bounded rationality' and 'moral hazard' in the making of appointments, and generates policies emphasising control by contracts wherever possible, and close definition of goals, objectives and functions. *Managerialism* provides for decentralisation, deregulation, and delegation by the principal to the manager within clear guidelines.

The focus of management of the New Zealand state sector has been turned from control through allocations - *inputs* of money, personnel and property - to accountability for contracted *outputs*, which are products or services. Financial reporting has also moved from an income-expenditure accounting regime to accrual accounting, which tracks the maintenance of the Crown's equity in its investments. All these perspectives can be applied to the education reforms, as implemented at both national and at school level.

An early extensive analysis of The Treasury view as expressed in its 1987 brief to the incoming government, as an example of 'New Right ideology', was that of *Lauder, Boston, Middleton and Wylie (1988)* in successive issues of the *New Zealand Journal of Education Studies*. Not till 1993 was the role of the other control department, the State Services Commission, critiqued by *Dale and Jesson (1993)* as the 'mainstreaming of education' into a state sector managerial model.

Some New Zealand commentators have perceived the devolution in education management as the implementing at long last of an emphasis on *increased community input* into curriculum and school governance dating from at least the Education Development Conference of the 1970's (*Barrington, 1991*, and *Phillips, 1993*). Others have perceived it rather as a strategic withdrawal by the New Zealand state when faced with a *legitimation crisis* arising from a crisis in capital accumulation in a developed capitalist economy (*Nash, 1989, Middleton et al, 1990* and *Smythe, 1989*). From Australia, *Cuttance (1992)* has distinguished the changes in New Zealand as devolution in a 'political' as opposed to an 'organisational' form.

Application of the NPM model and its theories to the schools sector has been analysed more recently by *Gordon (1995)* and *Wylie (1995)*. *Wylie* has noted the conflict for elected volunteer trustees who are expected to act as 'agents' of central government as 'the principal', when owing loyalty to other 'principals', ie their electorate of the parents of the local community. Stress felt by the principals of schools can also be analysed in terms of conflict they may feel in their role as 'agent' of the local board, which is constrained by national requirements and regularly measured for compliance by the Education Review Office, when they wish to operate as a professional leader within a collegial ethos in their school, which they conceive as a learning community. *Gordon* noted in addition the accumulating differential impact of the self-managing model on schools in low-SES communities lacking in human capital, particularly the skills of the professional classes available more readily on boards of schools in higher-SES communities.

The writer has two particular memories of a first viewing of the video on national television that sought participation by parents in the first elections for trustees in April 1989.

- A group of parents sitting around a table were debating the planning of a new gymnasium for the school. Trustees have not in fact been able to make such decisions. The complete articulation of the property investment decisions of the Ministry with operational management decisions by the boards has yet to be satisfactorily achieved. This has major implications for the management of enrolment schemes for schools threatened with overcrowding. It has raised difficult issues of access locally, and of fiscal responsibility nationally, in times of a need for renewed investment in education accommodation to cope with demographic growth.
- The focus of the reforms was proposed as administration rather than curriculum, a dichotomy posing difficulties for those who believe the key decisions in the management of education are to do with learning and its evaluation, what counts as the valued knowledge of the society, how it will be transmitted or developed, and how its possession will be assessed. These dilemmas for school and system managers will be the more acute in an acknowledged pluralistic society.

Addressing primary school principals in 1993, five years after his report, Brian Picot noted that even in advance of achieving a block grant for teachers salaries, the per-pupil funding available for use at local discretion moved in the first year of restructuring from $50/pupil to $800/pupil *(Picot, 1993)*. The Auditor General in 1992 *(Cameron, 1992)* noted that by 1991 2700 school boards controlled directly:

- expenditure of state grants of nearly $500 million;
- employment of teachers costing $1500 million;
- use of school land and buildings estimated to be worth $2,800 million.

THE LEGISLATIVE FRAMEWORK

The legislative framework for the ongoing change in education, and for its administration at both macro and school levels, is found principally in the Education Act 1989, the State Sector Act 1988 and the Public Finance Act 1989, each subsequently amended on several occasions. In the view of the Education Review Office *(1994)* reform of educational administration in New Zealand has placed a major emphasis on local governance as the means of promoting quality in education. This stance is reflected in the discourse of Office reviews of *board* performance in individual schools, and in its regular overviews, the quarterly Education Evaluation Reports which draw on data in most case from school reviews conducted over the twelve month period just completed.

Education Act 1989

Section 93 of the Education Act 1989 provides that every school shall have a board of trustees. The school boards are statutory authorities and as legal entities can sue and be sued. They have both extensive and specified rights and responsibilities.

Section 75 provides that:

> Except to the extent that any enactment or the general law provides otherwise a school's board has complete discretion to control the management of the school as it sees fit.

Section 76 is equally succinct concerning the responsibilities of the principal, who is a member of the board as a trustee, ex officio, and its chief executive.

> (1) A school's principal is the board's chief executive in relation to the school's control and management.
>
> (2) Except to the extent that any enactment, or the general law of the land provides otherwise, the principal
>
> (a) shall comply with the board's general policy directions; and
>
> (b) subject to paragraph (a) of this subsection has complete discretion to manage as the principal thinks fit the school's day to day administration.

The Board thus has an *ultimate* legal responsibility for the policies and practices of the school and a wide 'discretion'; the principal has a more focused responsibility, but with an equally recognised discretion for *implementing* the policies in the life and curriculum of the school. The sections notably distinguish 'control', 'management' and 'administration'. In practice, however, lines can become blurred - particularly in small schools in which board member expertise may be utilised in managing aspects of the administration of the school such as property maintenance or financial management, to free the principal for in-school leadership. **Figure four** and **figure five** from a Ministry of Education resource *(1997)* summarise the differing roles of principal and board.

Within the Education Act, some sections that restrict the discretion of a board, ie that provide for the *otherwise* of section 75, are:

Section 64(1)

> Every Charter has the effect of an undertaking by the Board to take all reasonable steps ... to ensure that ... the school is managed, organised, conducted, administered for the purposes set out or deemed to be contained in the Charter.

Section 60A

> The Minister may from time to time, by notice in the Gazette publish in their entirety or by way of general description national education goals ... national curriculum statements ... national administration guidelines ...

Section 61(2)

> Every Charter shall be deemed to contain the aims of achieving, meeting, and following (as the case may be) the national education guidelines...

The compulsory components of the charter framework issued in May 1989 by the Implementation Unit were Gazetted as the initial National Education Guidelines in 1990. A revised set of Guidelines was authorised by the Dr Lockwood Smith of the post-1990 government in March 1993. **(Appendix A)**

Disciplines are available in law to enforce these restrictions/requirements on boards:
Section 64 (2) (3) and (4)

Role of the Board

The board:

- has authority to control the management of the school within current legislation and the National Education Guidelines
- defines the purpose of the school
- sets policies and goals for significant areas
- appoints the principal and assesses his or her performance in meeting the school's goals
- supports the principal in managing the school
- ensures the school is communicating effectively with the community
- is not expected to be involved in the day-to-day running of the school.

Figure four

Role of the Principal

The principal:

- is, by law, a full member of the board
- provides information and guidance to the board
- acts as the educational leader of the school
- manages the school within the law and in line with board policies and goals
- oversees the day-to-day running of the school
- makes recommendations to the board on the appointment of staff
- oversees teacher appraisals and staff development programmes.

Figure five

(2) The Secretary [of Education] is empowered to take on the Minister's behalf [legal] proceedings having the effect of enforcing a charter, or constraining a board from taking any action that is contrary to a charter ...

(3) No person other than the Secretary has the power ...

(4) The Secretary shall not commence proceedings under this section without first consulting the Chief Review Officer ...

Section 107 (1)

If satisfied that ... by reason of mismanagement, dishonesty, disharmony, incompetence or lack of action ... or because it has taken or intends to take an unlawful action, or has failed or intends to fail to take a lawful action ... the Minister may by notice in the Gazette dissolve the board and direct the Secretary to appoint a person to act in its place.

For the second power, the ability to appoint a Commissioner to replace the board, there is no requirement for the Minister of Education or the Secretary of Education to consult with the Education Review Office or any other party. The possibility of a judicial review of the exercise of any statutory discretion should however persuade a Minister to act only after seeking advice, and to act only within established principles of administrative law, particularly those concerning the considered exercise of a discretion and those concerning natural justice. (In each of the 1995 and 1996 school years 5 commissioners were appointed.)

There is a more targeted power in section 81B by which the Secretary for Education can direct a board which has not provided accounts for audit in 90 days from the due date to appoint a financial manager whose powers include countersigning all cheques drawn on the board's accounts.

Public Finance Act 1989

The *Public Finance Act 1989* is the second significant piece of legislation that restricts the discretion of boards, by laying on them requirements of public financial and performance reporting that are demanded of all 'Crown Entities'.

Gilling (1993, page 197) comments that "since 1984 New Zealand's public sector has undergone a structural, organisational, managerial and accounting revolution". He describes three strands in the evolving reforms of reporting on the state sector - they were spun into a web from 1981 by the New Zealand Society of Accountants (NZSA); from 1984 by a new Auditor-General; and from about the same time from within The Treasury.

By 1984 two basic principles had been established - that adequate reporting in the public sector required non-financial as well as financial measures of performance; and that a shift from cash accounting to a full accrual system was necessary. By 1986 two further principles were focussed by documents of the Public Sector Accounting Committee of NZSA - that adequate reporting required comparison of actual financial results with budgets; and it also required definition in advance of performance objectives in both financial and non-financial terms.

Gilling notes however tension across the purposes of the Public Finance Act as passed in 1989. The Treasury's rubric was 'financial management reform'; the NZSA was concerned for 'the development of public sector accounting standards'; and the Auditor General was in search of 'effective public sector accountability' *(Ibid, page 207)*. Management, public accounting and public accountability each has a differing spin - concern for reform of *financial* management might well differ from a concern for reporting practices appropriate to the *public* sector and from *effective accountability*.

The requirements of *Section 41(2)* of the Public Finance Act have proved contentious for the managers of New Zealand's schools. The section provides:

> The annual financial statements shall be prepared in accordance with generally accepted accounting practice and shall include ...
>
> (d) A statement specifying the financial performance to be achieved by the Crown entity during the financial year as established at the beginning of the financial year
>
> (e) ... a statement of objectives specifying the classes of outputs produced ... as established at the beginning of the financial year ...
>
> (f) a statement of service performance reporting the classes of outputs produced ... as compared with the classes established at the start of the financial year ..

The Statement of Objectives and Service Performance (SOSP) is a requirement for both financial *and* non-financial reporting, asking in each case for the development of appropriate measures. It requires a statement of intended output production, with measures of *quality, quantity, cost and timeliness*, a statement concerning the service both as intended in its planning and as measured in its achievement. All school boards have been exempted up to 1997 from the requirement to produce SOSPs for audit, but cannot expect to continue to be exempted.

There has been suspicion by educationists of a procedure from within public sector accounting and reporting, but some boards have already had years of experience in this specification, ex ante and ex post, of their performance. A working party of principals, officials of the Ministry of Education and consultants in 1995 recommended initial development of SOSPs concerning -

- educational achievement,
- curriculum activity and development,
- pastoral care,
- community relations, and
- assets management.

Although this matter has not been further progressed, the Ministry of Education, with its responsibility at the macro level for the education sector, can expect continuing pressure from The Treasury to provide for the Crown additional quality specification on the spending in the major NDOCs (Non-Departmental Output Classes) for primary and secondary education. A new pressure was effected on the education sector by Section 44B of the Public Finance Act, passed at the end of 1992, concerning *'the Annual Report in relation to the schools' sector'*

A report is now required of the Minister of Education by each 30 June, to report on -

(a) The performance of the schools' sector in the *supply* of outputs

(b) The management performance in the schools' sector including the *quality* of the management systems

(c) The effectiveness of the schools' sector in terms of *achievement*.

The first such report was tabled in the House in 1994 and circulated to all schools as 'New Zealand Schools - *Nga Kura o Aotearoa* 1993'. Three further reports have been tabled on time each year.

The planning for the development of a document helpful to leaders in the schools while at the same time meeting statutory requirements on a report to parliament, and the gathering of data from the Ministry, the Education Review Office, the New Zealand Qualifications Authority and the annual reports of 2700 boards of trustees has been reported in a recent issue of *International Studies in Education. (Rae, 1996)*

State Sector Act 1988

The third significant piece of legislation impacting on the management of the education sector at all levels early childhood to tertiary is the *State Sector Act 1988*. In advance of the amendment of the education legislation in 1989, the new Act provided that the framework of private sector industrial relations would apply across the State sector, and so include education, and that responsibility for industrial relations in the education sector would transfer from the Director-General of Education to the State Services Commissioner. *(Rae, 1991b)* (In 1997 coverage has been withdrawn from the kindergarten teachers so that a consistent industrial relations framework, that of the private sector, now applies across the Early Childhood level.)

In the 1989 wage rounds the Commission sought to negotiate into employment awards personnel recommendations from the 'Tomorrow's Schools' white paper of October 1988, ie:

- employment in senior positions in schools to be based on individual contracts of service;
- flexible pay structures within the awards;
- personnel processes appropriate to the new environment; and
- new appointments, discipline, competency and surplus staffing procedures.

A 1989 amendment to the State Sector Act gave effect to the settlements reached. It:

- made boards of trustees the employers of staff in their institutions;
- implemented government decisions on contract employment in senior positions in secondary schools (on which the Commission had been unable to reach agreement with the secondary teachers' union);
- provided for establishing codes of conduct, and criteria for assessment of teachers' performance;
- provided for appointment and personnel procedures in a form consistent with state sector and 'good employer' requirements; and
- provided for use in the education sector of the grievances and disputes procedures of the Labour Relations Act 1987.

(In late 1989 a second amending Bill extended the provisions of the Act for the first time in a uniform manner across the tertiary sector.)

The new Government elected in 1990 wished to institute further labour market reform, with thrusts towards individual contracts of employment and choice for workers on who should represent their interests in relation to employment issues. The State Sector Act was therefore further amended to maintain the relationship of industrial relations across the private and state sectors. Boards of trustees as employers are now required to abide in particular to the provisions of Part V of the State Sector Act, personnel provisions applying to the state sector generally, and Part VIIA personnel provisions applying particularly to the education sector, the only state sector so singled out.

Responsibilities are assigned to the various parties engaged in management of the education sector.

- *Boards of trustees* as employers are required to make appointments on grounds of suitability for the position and all positions are to be advertised; boards are required to act independently when dealing with the appointment, promotion, demotion, transfer, discipline and cessation of their employees, and it is an offence for any party to seek to influence a board.
- The *Chief Executive of the Ministry of Education*, after consultation with the other parties, is able to prescribe matters to be taken into account in the assessment of teachers' performance, and to issue codes of conduct.
- The *State Services Commissioner* is given responsibly for negotiation of every CEC (Collective Employment Contract) in the education sector (again after consultation with the other parties), although with power to delegate to an organisation representative of employers, and has been required to concur in all individual contracts in the school and (till 1997) the pre-school sectors. To this year the Commission has been joined at the negotiations table by representatives of the New Zealand School Trustees Association and the Ministry of Education. From 1 July 1997 the Commissioner has delegated his responsibility for oversight of industrial relations in the education sector to the,Secretary of Education.

Those applying Public Choice theory sought a reduction in the influence of the pre-1989 education bureaucracy. An interesting perverse effect has ensued, as management of strategy and bargaining concerning salary levels and conditions of service passed in education to a 'control department' - ie away from the public and to the heart of government structures. In New Zealand's deregulated labour market the teacher unions have however maintained a strong position, and national contracts for all basic scale teachers. Wage bargaining rounds have been robustly negotiated in most years.

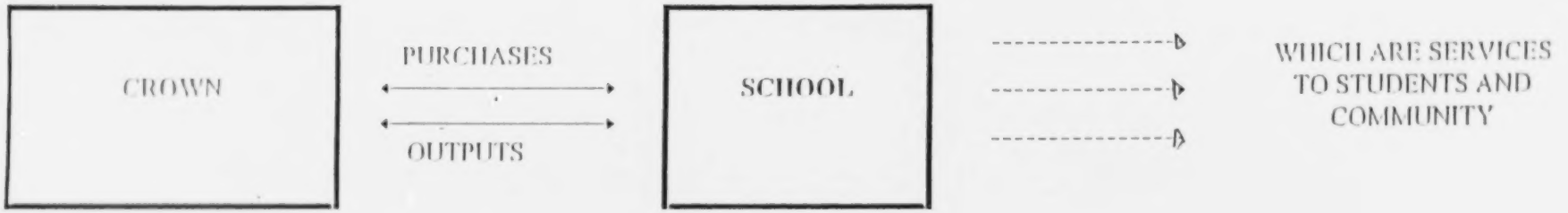
Boards as employers have to be mindful of their roles and responsibilities as laid down in legislation but also as contained in the collective contracts for assistant teachers, the separate collective contracts for senior teachers which include the principals in the primary sector, and the individual contacts for principals of secondary schools. All principal contracts are now supplemented by performance agreements with the board and an annual appraisal procedure conducted by the board

TWO MODELS OF STATEMENTS OF OBJECTIVES AND SERVICE PERFORMANCE PUBLIC FINANCE ACT SECTION 41

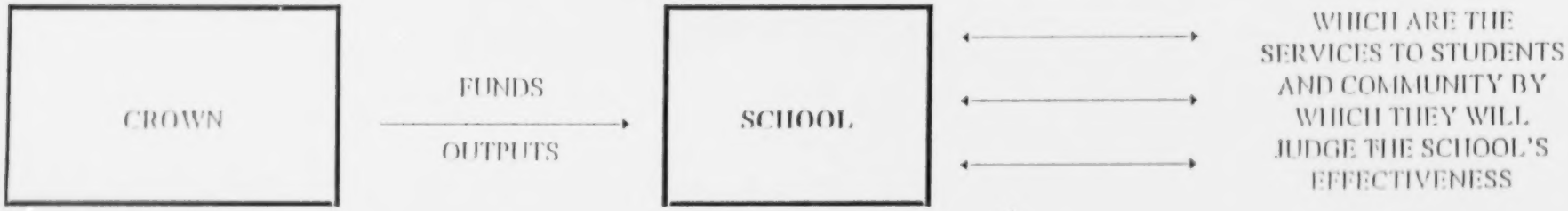
CROWN

BOARD OF TRUSTEES AS CROWN ENTITY

PARENTS/STUDENTS



SOSP ALLOWS CROWN TO CHECK PURCHASES ARE UP TO SPECIFICATION


CROWN
FUNDS
OUTPUTS
SCHOOL
WHICH ARE THE SERVICES TO STUDENTS AND COMMUNITY BY WHICH THEY WILL JUDGE THE SCHOOL'S EFFECTIVENESS

SOSP ALLOWS THE COMMUNITY TO EVALUATE THE SERVICES IT RECEIVES

Figure six

or its agent. Performance Management Systems for all teaching staff are this year being implemented in all schools in terms of agreements negotiated by the Commission in the recent salary round. Guidance has been provided in a series of publications issued by the Ministry of Education. Board actions in these areas are subject to personal grievance procedures provided for in the contracts and the industrial legislation, and they (and indeed the Ministry and the Commission) are also subject to the jurisdiction of the Labour Court.

In *summary*, for New Zealand's 2700 state schools, 95% of all schools:

- The *Ministry of Education* has responsibility for administration of the *Education Act 1989* and its focal linking devices of the charter and the National Education Guidelines. The Education Review Office conducts Effectiveness Reviews of school management and audits school boards for their compliance with the requirements of the charter. In 1997, in terms of an undertaking of the Coalition Agreement of the new government, its role is under review.
- The *State Services Commission* has responsibility for administration of the *State Sector Act 1988* and in education has sought to use the bargaining processes authorised by that Act to institute a managerial regime and performance monitoring in schools, with explicit accountabilities between boards and principals, and between principals and other staff. It has in 1997 however delegated its 'employer party' role in the bargaining round to the Ministry of Education. The Government plans that this year's round will bring about a Unified Pay System to build an integrated teaching service across the primary and secondary sectors.
- *The Treasury* has responsibility for the *Public Finance Act 1989* and has sought to extend to education as to all other sectors of the state financial management reforms which establish increased accountability to the Crown as purchaser of outputs from its agents. Debate continues on the appropriateness of its device of the SOSP, and the different perspectives and relationships that can be derived from Crown as purchaser and Crown as funder **(Figure six)**. The annual accounts of the boards are reported to a community meeting and after audit by an agent of the Auditor-General submitted to the Ministry of Education.

Imperfect articulation across the three regimes poses dilemmas for the managers of schools, the education professionals and the elected lay representatives charged with 'control of the management'. The representatives of the Education Accord, the national education organisations in the school sector, met recently with the Minister of Education and drew his attention to eight accountability regimes that they are expected to accommodate. They were suggesting perhaps that too many parties have been pleased to report on the 'weighing of the pig' - and possibly more investment could be made in 'growing better bacon' - ie equipping principals and trustees and teachers through professional development for the new tasks and the new pedagogy expected of them in a fast changing world.

THE TASKS FOR 1989

The rapid transition from 1988 to the world of 'Tomorrow's Schools' was managed at the centre by the appointment of a change agent Director-General on a short term contract, supported by a compact Implementation Unit recruited from within the

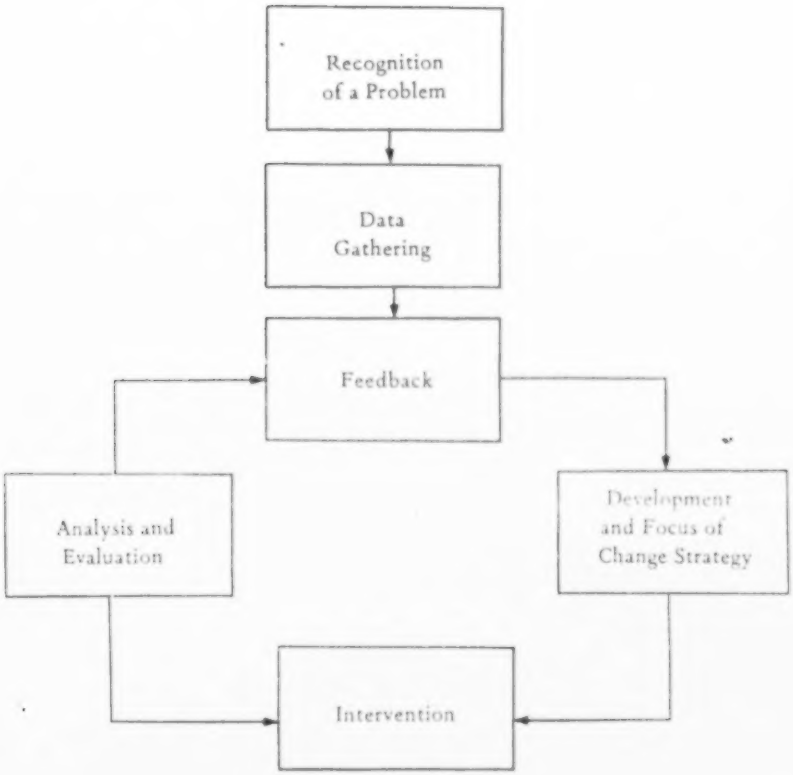


Figure 2:1 The School Development Problem Solving Process

Figure seven

Department of Education, and assignment of tasks by the Unit to a range of working parties drawn from the wider education sector. Outline structures of the range of new central agencies were revealed by a transition unit lodged with the State Services Commission in May 1989.

A response to the particular need of assisting new trustees was the development of a proto-New Zealand School Trustees Association drawing on the salaried personnel of the Secondary Schools Boards Association, the Education Boards Association and the School Committees Federation, all bodies to become irrelevant on 1 October 1989. Elections for national officers could be conducted in 1990, and the work of the association was supported by funding from central government for a team of field officers employed by NZSTA to work with boards of trustees.

At school level attention focussed on elections in April 1989 of the initial boards of trustees, successfully accomplished with support from a massive television publicity campaign. The boards were charged with developing a school charter, on the basis of consultation with their community including the Maori community, and were expected to use the National Education Guidelines component released by the Implementation Unit in May. From June and the release of indicative operational funding they could commence financial, management and personnel plans for the 1990 school year. From October 1 they assumed legal responsibility for the management of their school, which included the power to appoint staff.

Support was made available through the six colleges of education who were invited by the Implementation Unit to combine in a national Schools Management Development Project, working with clusters of schools each with a principal as a cluster leader. Clusters were also supported by a liaison inspector from the Department of Education, who was called upon to explain as need arose difficulties within the flow of paper emerging from Wellington. Cluster meetings were usually attended by the principal and a trustee, usually the chairperson.

Pressure points during this time were the extensive and prescriptive nature of the national mandatory component of the charter, the perceived inadequacy of the funding to achieve the mandatory charter objectives, and a modification of the legal base for the charter. The major Education Act, when introduced, redefined the charter away from the three way *contract* between school professionals, community and central government envisaged by Picot, so that it became an *undertaking* offered by the board to the Minister of Education concerning its control of the school.

A paper delivered to the IIP (International Inter-visitation Programme) conference in Manchester in 1990 *(Rae, 1991a)* commented on the significant new learning required of principals, especially primary principals many of them with ongoing responsibilities for classroom teaching, in establishing relationships with the trustees, distinguishing their respective spheres of 'management' and 'governance', accepting responsibility for budgetary advice to their board, managing the flow of information from the centre, and opening the school's goals and programmes to community debate.

PRINCIPALS' LEADERSHIP AND MANAGEMENT STYLES (Harold, 1995)

Principal	Method of Change	Style	Relationships with Parents	Attitude to Education
Len the Leader	Power-coercive. Closed Negotiation	Formal	Detailed	Teachers' educative and professional prerogative
Mike the Mediator	Normative. Open Negotiation	Informal	Compromise negotiation	Teachers' professional prerogative
Paul the Partner	Rational-empirical Normative-re-educative Open Negotiation	Informal Familiar	Close partnership	Shared responsibility

Figure eight

They had however strengths to draw upon -

- education policy on developing effective schools had stressed the recruitment of a qualified and trained teaching force;
- principals had been encouraged to work in a collegial manner with staff in school development programmes, sponsored within the teacher in-service programme by the Department from 1978-84;
- these programmes were supported by the extra-mural Masters course in Educational Administration offered by Massey University which encouraged adoption of a Professional Development Cycle *(Stewart and Prebble, 1985)* model of school improvement**(Figure seven)**;
- they had been required by regulation to develop, within the national curricula, school schemes of work which had to be appropriate to the needs of the student population and the needs of community and build on the skills of the staff; and
- at secondary level the model existed of boards who had always had responsibilities for governance, appointment of staff, and management of an operations grant.

The paper concluded:
'That schools have survived the new requirements laid on them in 1990 is a tribute to skills of adaptability, survival and leadership exhibited by their managers, in particular the principals, and to the commitment of teachers and trustees.' *(Rae, 1991a: page 53.)*

This commitment had been maintained despite the extent to which the strengths of the educational family and its professional ethos were discounted by the rhetoric and the practice of those managing the restructuring process off an NPM base.

The implementation process was subject to research commissioned by the Ministry of Education, The Monitoring Tomorrow's Schools Project *(Mitchell et al, 1991-93)*; to ongoing research by New Zealand Council for Educational Research, directed by *Dr Cathy Wylie(1994)*, and to occasional research as in the recently completed doctoral research of *Dr Barbara Harold (1995)* of the University of Waikato. From her ethnographic study of the transition in three small rural schools she was able to develop a table mapping in each case the crucial and varied relationships of principal and trustees and community, and principal and staff. **(Figure eight)**

She chose rural schools for the study because of the suggestion that there would be a scarcity of the needed human resource to maintain the management tasks of the schools, and primary schools because with withdrawal of the extensive administrative services of the district education boards they would be in the situation of greatest change. There was potential for contestational conflict with the withdrawal of district level hegemony, particularly when a local agenda differed from the national guidelines and goals.

One of the case studies allowed description of efforts by the Maori community to ensure the continued availability of bilingual education. There was no difficulty in any of the schools in recruiting trustees. In all cases the principal's role was pivotal to the process of achieving self-management. It was noteworthy that teachers were disproportionately represented among the trustees.

PRINCIPALS' LEADERSHIP AND MANAGEMENT STYLES (Harold, 1995)

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Figure eight

31

The Implementation Unit in 1989 calculated the total funding being expended nationally on professional development and passed 70% into the schools' operations grant, retaining 30% at the centre for allocation to national priorities. The School Management Development project lapsed on 1 October 1989 but the colleges of education were able to tender for an ongoing sequence of school development contracts let by the Ministry of Education, under the generic title of Achieving Charter Curriculum Objectives *(Rae, 1994)*.

The advisory services of the former Department were relocated in 1989 at the colleges. In 1997 30% of the advisory output is required to be directed to the support of self-managing schools. Consultancy services became more available as inspectors and education officers were restructured out of their positions in the former Department, and some new providers entered the field. In the 1997 Budget announcement there has been an increased allocation of professional development funding targeted to priorities established by the Government, in particular renewed curriculum and assessment development, and implementation of a teacher performance management system.

Government support for NZSTA has undergone modification over the years as the association has been expected to move to a self-funded basis. It is still in 1997 funded for advisory services to boards in personnel matters, for its statutory role in wage bargaining, and for contracted training of trustees. It has also been contracted on each occasion since 1992 to publicise and manage the triennial election process and has this responsibility for the next round scheduled for March 1998.

The Manchester paper noted in its concluding discussion the following issues:

- equity was uncomfortably yoked to other objectives in the reform process;
- tension was likely to persist between the elected representatives at the periphery and the centre - especially in a centrally funded system (88.4% of total funding from central government in 1995) with the Minister subject to the convention of joint Cabinet responsibility to parliament;
- tensions were especially likely if those at the centre viewed education as service delivery and those at the periphery viewed their schools as learning communities;
- support services are vital to support principals and teachers in times of change but models of professional development or supervision known to the New Zealand teaching force had been set aside in favour of close monitoring of accountabilities laid directly on the local school, its principal and its trustees in particular;
- the desired 'level playing field' for school-centre relationships had in fact become a very crowded playing field, with a range of games in progress, and there would be issues of communication to be resolved across the state agencies, as well as out to the schools; and
- although the reforms had made *power* available to communities the locus of *control* had yet to be established by practice in the new regime.

(Rae, 1991a, pages 46-51)

THE NEW WORLD IN 1993

The education reforms were intended in 1989 to meet the requirements of the more general state sector reforms for greater clarity concerning the roles of the state as *owner, funder, regulator* and *purchaser of services*. The objectives proposed in 1989 were increased *effectiveness, efficiency, economy - and equity*; and underpinning them a desire for more transparent *accountability*. Under the new minister post-1990, Dr Lockwood Smith, the watchwords became *achievement, choice, enterprise* and *national competitive advantage*.

By 1993 greater choice and devolution had been promoted by:

- School enrolment schemes where schemes were required because of a threat of overcrowding, placed management in the hands of the boards of trustees and the role of the Secretary reduced to certifying the threat, and hearing appeals in special cases;
- The option of bulk funding of teachers salaries had been made available to all schools and a three year trial implemented in sixty volunteer schools; and
- Bulk funding of some salaries had been established in all schools, implemented by a 1992 legislative amendment which instituted a Senior Grant for Management Salaries (based however on the actual salaries of the incumbents).

The new Minister had been on record since 1989 that the original charter framework was over prescriptive. An *Achievement Initiative* had been a major plank of the education component of the new government's election manifesto, emphasising a reshaped curriculum with new assessment procedures setting levels of achievement to raise educational standards. The model was similar to but not as prescriptive as that introduced in England and Wales by the Education Reform Act 1986.

In 1993 the school leaving age was raised to sixteen to implement a 1991 amendment to the Education Act. (In 1992 95% of students were in fact still in attendance on their sixteenth birthday.) Other significant amplifications of the regulatory framework had also been made ready for application to New Zealand's schools. They were:

- the release of the *New Zealand Curriculum Framework* document in English and in Maori on 7 April;
- promulgation by notice in the New Zealand Gazette of revised *National Education Guidelines* on 30 April;
- further amendments in June to the Education Act 1989 and in particular insertion of a new *Part XXVIII - Review of Educational Services*, which consolidated the provisions governing the Education Review Office;
- publication on 30 June of the first *Schools Sector Report* to meet a new requirement of the Public Finance Act; and
- notification to all secondary schools by the New Zealand Qualifications Authority on 23 July of its requirements concerning quality management practices in schools to permit *registration of school programmes on the National Qualifications Framework*.

In a 1991 OECD monograph on 'The Effectiveness of Schooling' Professor Judith Chapman depicted the environment facing education managements across the developed world as follows:

'At present there is an environment of more stable demographic change but continuous public financial stringency and competing social demands. Combined with recent concerns about the goals and outcomes of schooling, the quality of education, labour market adjustments and the relationship between education and international economic competitiveness, such pressures have forced education authorities to reassess educational needs, both qualitatively and quantitatively.

'In response to these demands, education authorities in some OECD countries have undertaken certain reforms which have direct implications for the redistribution of administrative power among the various levels within the education system, including the school itself. In an attempt to understand these changes a recent OECD report suggests that the redistribution of power is in fact more complex than any account based on a conception of rearrangements along the centralisation-decentralisation continuum would suggest. ... Thus terms such as 'centralisation' and 'decentralisation' in this context become too limited to give a complete account of what are far more complex developments, problems and issues.' *(Chapman, 1991: page 6)*

The Chapman comment provides a theme through which the five 1993 initiatives may be explored. Devolution of powers to the schools is usually accompanied by increased specification of goals by the central authorities.

The ***Curriculum Framework*** provided for nine principles and seven 'essential learning areas' to underpin all teaching and learning, and specified essential skills, attitudes and values to be developed by all learners**(Figure nine)**. It did not occasion in New Zealand the debate such provision raised in England and Wales. New Zealand teachers and parents, in a small country with a mobile population, had valued equality of educational opportunity and a national curriculum to ensure compatibility of schooling experiences for children moving schools.

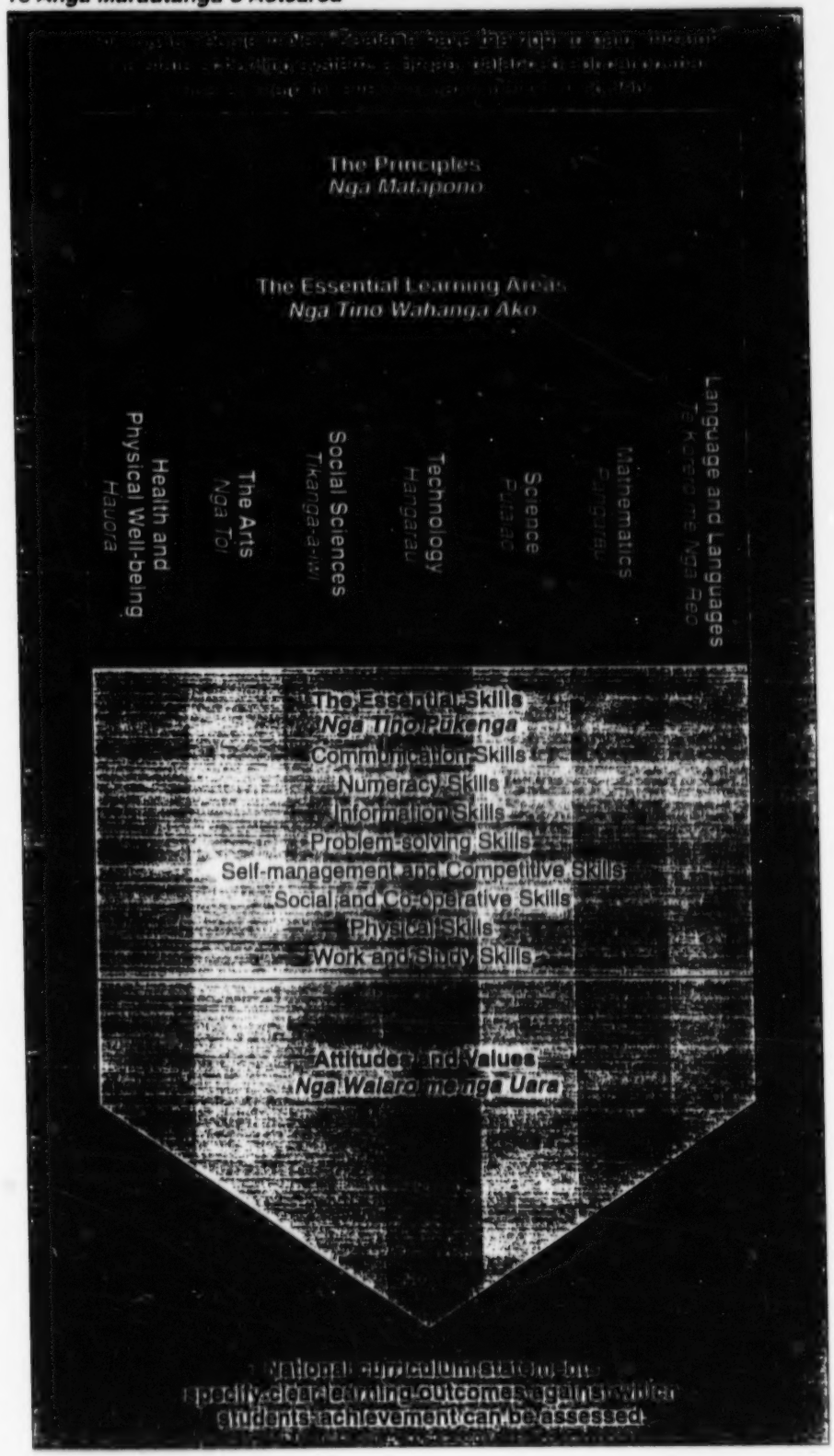
The document adheres to New Zealand tradition of in-school curriculum development by leaving the devising of programmes at school level to the principal and teachers, but now subject to policy oversight by the board. The focus of the more general state sector reform is embodied however in a concern for assessment and monitoring, both in-school and across the system, to allow progress to be monitored and reported locally and nationally. A levels model is adopted, with exemplars to be made available for the assistance of the schools.

Some years after restructuring, evaluation of the effectiveness of schools could at last have a theoretical base which would in time be securely framed in terms of learning outcomes.

The initial ***National Education Guidelines*** developed in 1989 had families of goals and objectives dealing in turn with curriculum, community partnership, equity, Treaty

Figure nine

The New Zealand Curriculum Framework
Te Anga Marautanga o Aotearoa



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of Waitangi, personnel policy, staff development, financial management and property management. They provoked some dissent when first distributed in early 1989 for incorporation into school charters, on grounds that they were too prescriptive and could be construed as 'social engineering'.

The revised Guidelines promulgated in 1993 **(Appendix A)** had the significant potential to reduce seventeen goals and forty six objectives to ten National Education Goals and six National Administrative Guidelines. These Guidelines covered the fields of curriculum, personnel practice, financial and property management, health and safety legislation, legal requirements of pupil attendance and the length of the school day and the school year. There are now no nationally specified objectives and the number to be pursued as priorities in any year is a matter for decision by the school board.

The Education Review Office is able to assess each board of trustees on its management in terms of two new requirements in the 1993 notice - that the board documents how the National Education Guidelines are being implemented and that it maintains a process of self-review. In 1997 the Ministry has supported boards in their tasks of self review and planning by production of the kit, *Governing and Managing New Zealand Schools: A Guide for Boards of Trustees.* The kit draws on the experience of a range of schools to provide guidance rather than directions to the boards.

The consolidated ***legislative base for the Education Review Office*** spelt out the power of the Chief Review Officer to carry out reviews, either as directed by the Minister or on her own initiative, reviews of a wide range of educational services that will be general or particular; to have reports prepared for the Minister of the basis of those reviews; and 'to give the Minister such other assistance and advice on the performance of [educational] organisations as the Minister from time to time requires.' It made possible a clearer distinction between the power and functions of the Chief Review Officer and the regulatory and operational functions of the Secretary for Education and the range of agencies in the education sector.

The 1993 legislation reflected the negotiation the previous year with a new Chief Review Officer of reshaped outputs for the Office. These were advised to schools by notice in the *Education Gazette (Smith, 1992)* as:

- *Assurance audits* - measures of compliance with legislative regulatory or contract requirements, including the quality of service delivery (discretionary audits could 'follow up regular audits which had disclosed poor performance - or in cases of community concern')
- *Effectiveness reviews* - evaluation of the contribution made to student achievement in terms of both standards and progress from the quality of the teaching services, management systems and practices of the institution;
- *Evaluation services* - national impact evaluation of the effects of curriculum policy or management structures - and overview reports provided by analyses of assurance audits and effectiveness review; and
- *Ministerial Services* - briefings, correspondence, speech notes, parliamentary questions, including advice on policy developed by other agencies.

These outputs as implemented since 1993 mark a significant shift away from the dual goals of reviews promoted in 1988 in the Picot Report - that a Review and Audit Agency would undertake reviews with an interdisciplinary team, assisted by a coopted principal and a community representative, to:

- help the institution assess its own progress towards achieving its objectives (a catalyst role); and
- provide a public audit of performance in the public interest (an audit role).

(The Task Force, 1988: page 60)

The Office as agent of the government has moved entirely into audit mode in its relationships with the institutions and has adopted the stance that in maintaining the interests of students and parents its most effective sanction is the provision of public information. It therefore releases its findings, after a period in which the school board is allowed to suggest corrections of factual error, to the media as a matter of standard practice. Schools, especially in some lower-SES communities, have felt such exposure bruising - and damaging to fragile morale rather than a spur to renewed effort. In 1997 in terms of an undertaking in the Coalition Agreement a review is being conducted of the Office, 'to ensure an auditing/monitoring system for schools that best serves the needs of a modern education system'.

The announcement of ***NZQA accreditation procedures for schools*** arose from the responsibility on the Authority in a new section of the Education Act in 1990 to build a National Qualifications Framework. The concept of the NQF won support in 1990-1 for its goals of rewarding all learning and skills wherever acquired - in educational institutions, work place, or from community providers; removing distinctions between academic awards and other qualifications; rationalising the complex web of trade certifications, and encouraging lifelong learning. The Authority has accordingly been working since 1991 on setting up of an extensive bank of achievement-oriented unit level standards, without overlap, and making provision for portability by the learner of all unit standards passed, across providers and into more occupation-specific qualifications.

Schools were advised late in the winter term that to be entitled to assess and award credits towards the Authority's proposed National Certificate and National Diploma, qualifications on the lower levels of the nine level framework, accreditation of their school by the Authority would be required. The schools 'quality management systems' would be subject to a three year monitoring cycle undertaken by Authority analysts or specialist teachers under contract to the Authority.

The letter incorporated a notice from the Secretary for Eduction advising that the Ministry would manage a programme for the writing of twenty six National Curriculum Statements over the next two years and this would permit the Authority to commission afterwards the writing of unit standards in these areas of the curriculum at levels appropriate to the senior secondary school.

School principals were alarmed at the prospect of information overload for teachers and administrators, and the implied loadings of consultation if there was to be

practitioner input into developing curriculum statements and assessment instruments. The limitation of backwash from assessment into curriculum and pedagogy was a matter of escalating concern. There were fears of atomisation of subjects with the adoption of a range of unit standards within subjects, and concern that merit could not be distinguished from a pass. There was in particular an issue of dual accountabilities, and a second monitoring of school practice for 'non-conventional' subjects to supplement that of the Education Review Office, seemingly to be imposed without any prior consultation.

By 1996 the new minister Hon Wyatt Creech had responded to a teacher union moratorium on curriculum and assessment development, and to other pressures which he perceived in the restructuring of education, by establishing a Teacher Workload Working Group. By the end of the year the new Coalition Government had announced a full review of the Framework. Specific provision has been made in the 1997 Budget for resourcing of professional development arising from curriculum change and Framework development. A resumption of curriculum development was announced in July. **(Appendix B)**

The ***Schools Sector Report*** was introduced on the advice to government of parties beyond education, as a vehicle for shaping accountabilities to the Crown. As developed by the Ministry of Education it has been presented each year in a user-friendly format - so that the Minister when reporting in parliament is reporting on what has been achieved in the schools, and in a manner from which the trustees, lay and professional, can derive relevant data, and so position their school amongst its peers and plan appropriately for the school's improvement.

To summarise, these countervailing pressures in 1993 towards centralisation and decentralisation were nicely encapsulated by successive items in a midday national news broadcast in August 1993. In the first the national president of the secondary teachers' union was calling for the contract appointment of a coordinating director-general to manage the introduction of curricular reform and the new qualifications framework. In the next item the NZSTA was reported to be taking an injunction against the Minister of Education, who on the advice of the Education Review Office had dismissed the board of a rural primary school in Southland of thirty one pupils and proposed to have the Secretary appoint a Commissioner.

On the first issue the Minister replied to the meeting of the union's annual conference later in the month that *he* would coordinate the work of the Authority and the Ministry - a very proactive 'strategic withdrawal' to the core business of the State (to paraphrase *Nash, 1989*), a blurring of accountabilities for policy and management and for outputs and outcomes of the NPM model, and a triumph of political initiative over Public Choice theory. On the second issue, the Minister's use of a statutory discretion was upheld in the courts, on the grounds that he had sought and considered advice.

THE WAY AHEAD IN 1997

The parameters for Government policy in 1997 have been set by the Coalition Agreement, negotiated after New Zealand's first election in 1996 under MMP rules

between the National Party which led the outgoing coalition government and the New Zealand First Party which holds a balance of power in the new parliament. **(Appendix C)** The recent announcements of the 1997 Budget indicate policy decisions taken so far by the Coalition Government. **(Appendix D)**

In 1997 the policy document, *Education 1997-99: A Government Strategy*, proposes as contemporary objectives for education:

'To secure our economic and social future, New Zealand needs an education system which:

- strives to improve educational outcomes for all students, including those at risk of failure
- enhances both personal development and employment opportunities
- contributes to a highly skilled, adaptable and highly motivated workforce by promoting lifelong learning
- focuses on the challenges of the 21st century
- fosters fairness, tolerance, self-reliance and informed participation in New Zealand society.' *(1997, page 2)*

The note of inclusiveness redirects the debate on *equity*, a central concept in 1989 but underplayed immediately after the 1990 election. Debate on issues of equity was significantly advanced when *Codd (1993)* explored the paradox posed since 1987 by the juxtaposition in the policy discourse under both Labour and National administrations of the goals of achieving both 'equity' and 'choice'.

Codd contrasts the Utilitarian, Market-Liberal concept of education as a *preferred good* to be competed for, with the Rawlsian concept of education as a *primary good*, its possession essential for the citizen to participate in society and to make appropriate life choices in a manner which accords with social justice. He also explored the concept of education as a *positional good*, in a market imperfect on both the demand and supply sides - so that the more choice some possess the less choice is available to others.

He noted a tension between *substantive* policies in the New Zealand reforms based on principles of social justice, and *procedural* policies grounded in Market-Liberalism. There are for instance national curriculum statements to establish uniform goals and opportunities for all schools and their students - but abolition of zoning to permit choice and responsiveness, and difference between schools.

Codd suggests the fundamental opposition of principles of *social justice*, concerned that any reform should be measured by its effect on the least advantaged in society, and the principles of *Utilitarianism* in which the greatest good of the greatest number is the goal, even if some are to be disadvantaged. The discourse up to 1990 was of effectiveness, efficiency, economy - and equity. The post-1990 rubric has stressed achievement, choice, enterprise and competitive advantage, a shift clearly to a more Utilitarian thrust.

He commented in conclusion that to make choice available does not mean that all can make choices. A most telling proposition in the Codd essay is the suggestion that a belief in the market establishing quality and responsiveness in schools, as some succeed and others fail, is in fact to believe that students can as a matter of course attend failing schools. That this is unsatisfactory even to Utilitarian Market-Liberals is suggested by the creation in 1989 of a single-purpose Education Review Office, and its initial focus in 1992-3 on assurance audits.

Thrupp (1995) has since analysed the differential impact of competition and markets on high-socioeconomic status (SES) and low-SES schools. He noted the effects on the low-SES schools of a range of social policies since 1991 Budget announcements reshaped the New Zealand welfare state, in areas such as welfare, health and housing. These effects include greatly increased pupil turnover from relocations of families under economic stress, a matter that is not a concern for more favoured schools in more favoured suburbs. Thrupp proposes that so-called 'loser' schools and their children deserve not to be allowed to fail - or terminated. Rather, in the interests of equity and of avoiding increased social costs downstream, the schools deserve additional assistance in their resourcing.

Choice has not only produced inequities. Research commissioned by the Ministry of Education from a Victoria University of Wellington - University of Canterbury team *(Hughes et al. 1996)* indicates that it is also likely to produce inefficiencies. Their longtitudinal research has uncovered not only 'polarisation' of the intakes in less favoured schools (SES composition lower than that of the surrounding community), but knock on effects as students fleeing those schools affect perceptions of a second group of schools. **(Figure ten)**

'In a sense as schools in depressed socioeconomic areas experience a cycle of decline, the problems they have to cope with may simply be exported to other schools, in which case we can expect another shake out in those schools, and so on.' *(Ibid, page 24)*

Extra pressure meanwhile goes on to the finite number of places available in favoured schools in more favoured suburbs, and the more expensive real estate increases the relative costs to Vote Education of any school expansion. In times of renewed growth in school populations and finite resources available for central government, classrooms in some schools are in increasing danger of being under-utilised.

A sense of unfairness had been roused since the change in legislation in 1991 by the actions of some schools who have controlled their enrolment schemes in a manner which denies access to some students living in the locality, in favour of distant students considered more likely to contribute to the reputation of the school. In June 1994, 37 schemes out of the 269 authorised did not have zones, and 4 of those 37 made no mention of proximity to school as a criterion. By June 1997, 78 schemes out of 414 did not have zones and 13 of the 78 made no mention of proximity to school as a criterion.

Figure ten

FIGURE 1: Numbers of Smithfield students from each school's catchment area who attended another school in 1994.

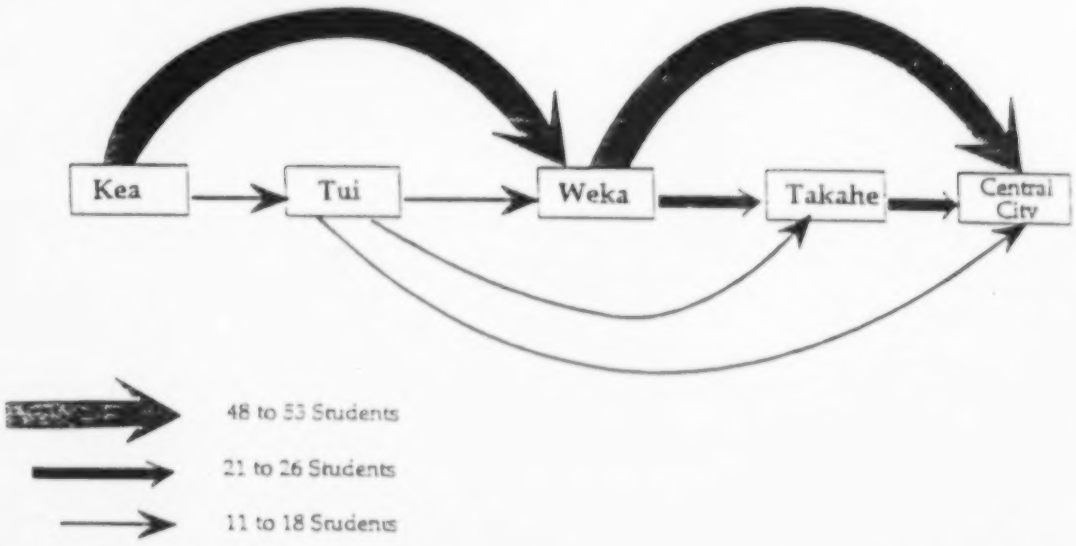

Figure 1 gives the detail of student movement between schools. For example, very large numbers of students (48-53) moved *to* Weka College from Kea's catchment area and *from* Weka's catchment area to central city schools. Smaller numbers (11-18) moved to Weka from Tui with moderate numbers (21-26) moving from Weka to Takahe.

Overall, the flow of students shown in Figure 1 is clearly unidirectional, with the flow going in the direction Kea, Tui, Weka, Takahe and to the central city. No students from the central city moved to any of these four suburban schools and the few movements against the flow between the four schools involved only one to three students in each case. There is an exact match between the direction of flow of students and both mean SES of schools and percentages of Pakeha students. Kea College, for which the flow was outward, had a mean SES of 5.6 and only six percent Pakeha students. The central city schools which had an inward flow of students, had a mean SES of 2.9 and 77 percent of their third form intakes were Pakeha. The mean SES and the percentages of Pakeha students for the other three schools fell between these two extremes in the same order as the flow shown on Figure 1, e.g. Tui College, which had the second smallest inflow of students had the second lowest mean SES and the second lowest percentage of Pakeha students.

Hughes et al (1996)

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Issues of equity are combining with a need for best value for money for the Crown's investment, as owner of the school network, to bring about modifications to the education market model, and the pure theory of NPM which devolves responsibility and accountability to the local level.

The Coalition Agreement provides for a major review of the Education Act 1989 within the three year term of the present parliament 'to provide enabling legislation'. In advance of that major review exercise, amending legislation will be necessary to give effect to another undertaking of the Coalition Agreement, 'to support the concept that priority of attendance at neighbourhood schools will be given to those living in the local area.' There will be a constraint on the market model.

Policy approvals in the 1997 Budget provide $30 million over the next three years 'to support schools having difficulty in providing a good education. The extra investment will help strengthen and support the education they provide.' Funding is available to support an anticipated thirteen major interventions by the Ministry each year to maintain the viability of schools which have come under threat in the education market. A methodology has been developed which provides for a business plan to be developed between the Ministry and the board of trustees,with the goal of restoring full capacity for self managmenrt. A capital injection is dependent on the board agreeing to accept and meet a set of performance indicators. Funding is also available for up to six school improvement projects that will work in a similar way with groups of schools in a particular locality, or showing similar characteristics in their student intakes.

A new scheme with $5.8 million available over three years will encourage small schools to join in clusters and so reduce administrative pressures on principals and trustees. Facilitators contracted by the Ministry will support them in arranging joint purchasing arrangements, supplementing their small human resource base by common purchasing of access to expertise in financial, personnel and property management. Both these policy initiatives modify the NPM model.

The 1997 Budget also addresses with a major injection of funds another issue not resolved by the new funding structures introduced in 1990 - that of ensuring equitable provision for special education needs. The introduction of self management coincided with a provision in the 1989 legislation which gave families whose children required special education support the right under a policy of mainstreaming to enrol in the school of their choice.

This has posed a dilemma for school boards *with* enrolment schemes as they pondered policy concerning their choice of students. It provided a different dilemma for school boards *without* an enrolment policy as they pondered the reaction of families who considered attention and extra funding from the bulk grant to students with special education needs would reduce the resources available to their children - and choose a neighbouring school.

The 1996 Budget of the previous government had taken the first step in the *Special Education 2000* project by providing an additional $55 million over three years for a

Special Education Grant to all state and state-integrated schools. This grant took effect from the beginning of the 1997 school year and targets students with learning *and/or* behaviour difficulties up to and including those with 'moderate special education needs'.

In May 1997, the Coalition Government announced further details of *Phase 2: Special Education 2000*. It agreed in principle to proceed with the next phase of the policy in 1998 with final decisions on implementation of Phase 2: Special Education 2000 to be made by later in 1997. The aim of Phase 2 of Special Education 2000 is to target students with 'high and very high special education needs' in an equitable way. Key components include:

- An Ongoing Resourcing Scheme, a portable entitlement for students with ongoing very high needs
- Initiatives for Other Students with High Needs including:
    - Students with Severe Behaviour Difficulties
    - Students with Significant Speech or Language Difficulties
- Special Education in the Early Childhood Sector
- Professional Development and Training
- Evaluation and Monitoring.

The 1997 Budget has set aside $150-200 million over three years to meet the costs of these initiatives.

CONCLUSION

The New Zealand experience is that 'schools self management within national guidelines' is a journey rather than a destination. The destination is in fact more effective schools, now proposed by a new Secretary of Education as an 'enhanced capability' built into the network of the state's schools.

Two pioneers in the school development movement in New Zealand in the eighties, and pioneers in the New Zealand Educational Administration Society, had an illustration in their text about ' the influence pie' *(Stewart and Prebble, 1985, page 74)*. The aim of school development was not to slice the pie in a new more inclusive manner. This would result only in smaller pieces. The aim was to bake a bigger pie.

Power-sharing, the theme of this conference, is about baking a bigger pie - empowering principals, teachers, students, families and communities, increasing their capability for participation in education and in society. It will continue to pose dilemmas and challenges for those charged with leadership, at the centre and in the schools, in New Zealand as in South Africa.

A Maori *waiata* extols the theme of empowerment:

Hutia te rito o te harakeke,
Kei hea te korimako e ko?
Ki mai ki ahau
He aha te mea nui o te ao?

Maku e ki atu -
He tangata, he tangata, he tangata, hi!

If you pluck the heart from the flax bush, where will the bell bird sing?
You ask me what is the greatest thing in the world -
I give you this reply.
It is the spirit and drive of humankind.

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Appendix A

National Education Goals

Education is at the core of our nation's effort to achieve economic and social progress. In recognition of the fundamental importance of education, the Government sets the following goals for the education system of New Zealand.

1) The highest standards of achievement, through programmes which enable all students to realise their full potential as individuals, and to develop the values needed to become full members of New Zealand's society.

2) Equality of educational opportunity for all New Zealanders, by identifying and removing barriers to achievement.

3) Development of the knowledge, understanding and skills needed by New Zealanders to compete successfully in the modern, ever-changing world.

4) A sound foundation in the early years for future learning and achievement, through programmes which include support for parents in their vital role as their children's first teachers.

5) A broad education through a balanced curriculum covering essential learning areas, with high levels of competence in basic literacy and numeracy, science and technology.

6) Excellence achieved through the establishment of clear learning objectives, monitoring student performance against those objectives, and programmes to meet individual needs.

7) Success in their learning for those with special needs by ensuring that they are identified and receive appropriate support.

8) Access for students to a nationally and internationally recognised qualifications system to encourage a high level of participation in post-school education in New Zealand.

9) Increased participation and success by Māori through the advancement of Māori education initiatives, including education in Te Reo Māori, consistent with the principles of the Treaty of Waitangi.

10) Respect for the diverse ethnic and cultural heritage of New Zealand people, with acknowledgment of the unique place of Māori, and New Zealand's role in the Pacific and as a member of the international community of nations.

National Curriculum Statements

See also National Curriculum Statements, pages 7–8.

As at January 1997:

- *Mathematics in the New Zealand Curriculum* (1992)
- *Science in the New Zealand Curriculum* (1993)
- *English in the New Zealand Curriculum* (1994)
- *Technology in the New Zealand Curriculum* (1995)
- *Social Studies in the New Zealand Curriculum* (draft, 1996)

Parallel statements for students who learn in Māori:

- *Pāngarau i roto i te Marautanga o Aotearoa* (1996)
- *Pūtaiao i roto i te Marautanga o Aotearoa* (1996)
- *Te Reo Māori i roto i te Marautanga o Aotearoa* (1996)
- *Tikanga-ā-iwi i roto i te Marautanga o Aotearoa* (draft, 1997)

Under development:

- *Health and Physical Education in the New Zealand Curriculum*
- *The Arts in the New Zealand Curriculum*
- *Hangarau i roto i te Marautanga o Aotearoa*
- *Hauora i roto i te Marautanga o Aotearoa*
- *Ngā Toi i roto i te Marautanga o Aotearoa*

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In order to ensure that the National Education Goals are met, Boards of Trustees and principals respectively, are also required to follow sound governance and management practices involving curriculum, employment, financial and property matters applying to schools, and the Board of Trustees' Code of Conduct. Further details of these requirements are found in the relevant legislation, appropriate contracts of employment, property occupancy documents and, from time to time, guidelines promulgated by the Secretary for Education.

(1 Boards of Trustees must foster student achievement by providing a balanced curriculum in accordance with the National Curriculum Statements* (ie, The New Zealand Curriculum Framework and other documents based upon it).

In order to provide a balanced programme, each Board, through the principal and staff, will be required to:

implement learning programmes based upon the underlying principles, the stated essential learning areas and skills, and the national achievement objectives; and

monitor student progress against the national achievement objectives; and

analyse barriers to learning and achievement; and

develop and implement strategies which address identified learning needs in order to overcome barriers to students' learning; and

assess student achievement, maintain individual records and report on student progress; and

provide appropriate career information and guidance for all students, with a particular emphasis on specific career guidance for those students who, meaning the end of their schooling, are at risk of becoming unemployed.

*Existing syllabuses are to be regarded as national curriculum statements until they are replaced.

2 According to the legislation on employment and personnel matters, each Board of Trustees is required in particular to:

develop and implement personnel and industrial policies, within policy and procedural frameworks set by the Government from time to time, which promote high levels of staff performance, use educational resources effectively, and recognise the needs of students;

be a good employer as defined in the State Sector Act 1988 and comply with the conditions contained in employment contracts applying to teaching and non-teaching staff.

(3 According to legislation on financial and property matters, each Board of Trustees is also required in particular to:

allocate funds to reflect the school's priorities as stated in the charter;

monitor and control school expenditure, and ensure that annual accounts are prepared and audited as required by the Public Finance Act 1989 and the Education Act 1989;

comply with the negotiated conditions of any current asset management agreement, and implement a maintenance programme to ensure that the school's buildings and facilities provide a safe, healthy learning environment for students.

(4 Each Board of Trustees is also required to:

document how the National Education Guidelines are being implemented;

maintain an ongoing programme of self-review.

(5 Each Board of Trustees is also required to:

provide a safe physical and emotional environment for students;

comply in full with any legislation currently in force or that may be developed to ensure the safety of students and employees.

(6 Each Board of Trustees is also expected to comply with all general legislation concerning requirements such as attendance, the length of the school day, and the length of the school year.

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The New Zealand Gazette no. 58, 1993, pages 1086-7

Education Gazette

Volume 75 Number 21 July 1997

NEW CURRICULUM TIMELINES

The Minister of Education has decided to lift the pause on national curriculum development. New timelines for curriculum development and implementation have been developed. It has been decided to introduce a transition period between the publishing of a final national curriculum statement and its gazetting - when it becomes mandatory. An outline of the new timeline is below. More details will be contained in Curriculum Update 21 enclosed with the 4 August *Education Gazette*..

On 28 May 1996 the Minister of Education decided that the further development and implementation of the national curriculum and qualifications reforms in schools should be paused pending consideration of related workload issues by a Ministerial Consultative Group.

A notice in the 15 July 1996 edition of the *Education Gazette* informed schools that there would be a slowing in the pace of the reforms in response to widespread concern across the school sector about the scale, pace and workload implications of the changes.

Meetings were held with sector group representatives in April and May 1997 to discuss curriculum changes in schools. Subsequently, new curriculum timelines were put forward to the Workload Group at its meeting on 14 May 1997 and met with approval. The timelines indicate the timing of publication of draft and final national curriculum statements, in English and Māori, and the date from which schools will be expected to be fully implementing them.

The agreed timeline is printed below. Key aspects of the agreed plan to implement the new statements, including transition times, the revoking of current syllabuses, and proposed changes to relevant legislation, are outlined overleaf.

Curriculum Update 21, to be published with the 4 August issue of the *Education Gazette*, will contain more detail for schools to consider in their planning for curriculum implementation.

the new timeline

English Medium	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**
Technology	*professional development and support materials*		*fully implemented*			
Social Studies	*final published*	*professional development and support materials*		*fully implemented*		
Health & Physical Education	*draft published for consultation*	*final published*	*professional development and support materials*		*fully implemented*	
The Arts		*draft published for consultation*	*final published*	*professional development and support materials*		*fully implemented*
Māori Medium						
Tikanga-a-iwi *	*draft published for consultation*	*final published*	*professional development and support materials*		*fully implemented* *	
Hangarau *	*draft published for consultation*	*final published*	*professional development and support materials*			*fully implemented* *
Nga Toi *		*draft published for consultation*	*final published*	*professional development and support materials*		
Hauora *			*draft published for consultation*	*final published*	*professional development and support materials*	

* In view of the particular workload and curriculum support issues faced by Maori and Maori medium teachers, final implementation dates for these curriculum statements will be confirmed following further consultation

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Key items of the implementation plan

transition

A transition period of at least two years is being put into place between the publication date of each final national curriculum statement and the time when schools are required to be implementing it in classrooms.

During the transition period schools will be expected to provide programmes in each of the seven essential learning areas of the New Zealand Curriculum, including the area covered by the new curriculum statement. However, in this period schools will not be required to base programmes wholly on the new statement, nor on the old syllabus. They will be expected to progressively develop programmes so they are prepared to implement fully the new statement when it is gazetted.

During the transition, schools may be using the old syllabus, the new curriculum statement, or a mix of the two. Schools may introduce the new curriculum in a phased way, eg, a secondary school could trial the new social studies in 1998, implement fully in year 9 in 1999, and in year 10 in 2000.

The expectations of schools will be clearly signalled in a notice to Boards of Trustees and school principals accompanying the release of each final national curriculum statement.

The transition period will allow schools to move towards implementation at their own pace and with support from professional development programmes, and school support services. The Ministry will also be able to provide additional curriculum support materials during this period.

revoking of existing syllabuses

To make this transition period possible, the Government will revoke each existing syllabus when its replacement final national curriculum statement is published. The new national curriculum statement will not be gazetted until the end of the transition period.

The following syllabuses will be revoked when the related national curriculum statements are published in their final form:

existing syllabus:	*revoked end of:*
Workshop Craft: Forms 1-4	1997
Social Studies in the Primary School	1997
Social Studies Syllabus Guidelines: Forms 1-4	1997
Home Economics: Forms 1-4	1998
Health Education in Primary and Secondary Schools	1998
Physical Education: Junior classes to Form 7	1998
Art Education: Junior classes to Form 7	1999
Music Education: Early Childhood to Form 7	1999

reviews of the curriculum

The Ministry will conduct three kinds of curriculum review to ensure that the new national curriculum statements are:

- achieving the intended improvements in student achievement;
- individually and collectively manageable for schools;
- regularly kept up to date.

Schools need to have available a complete set of national curriculum statements in order to plan and implement a balanced curriculum in accordance with *National Administration Guideline* 1 and the *New Zealand Curriculum Framework*.

I am confident that the plans outlined above will enable teachers to implement the New Zealand curriculum in a manageable and effective way.

Howard Fancy

Secretary for Education

Policy Area: Education

Statement of General Direction:

Our goal is to become the most highly skilled nation in the world, with relevant skills and academic acumen widely distributed throughout the community. We believe that education is the single most important investment we can make in New Zealand's future and as a priority see the focus on early childhood education, the formative years and the compulsory sector generally. Education and training should be seen as lifelong exercise by New Zealanders.

Key Initiatives of Policy:

Early Childhood

1. Significant additional funding (minimum $10M) over and above current levels of expenditure will be made available to support further development of the early childhood education sector.

Compulsory Sector

1. Urgency will continue to be given to addressing the problems of teacher supply and accommodation for the compulsory sector.
2. Alternative forms of professional leadership and administration in clusters of small schools will be piloted.
3. The Government will support the development of middle schools for communities wishing this form of schoolingg structure by removing obstacles to such developments.
4. Legislation will be introduced to support the concept that priority for attendance at neighbourhood schools will be given to those living in the local area.
5. The parties will agree to continuation of the status quo policy (dual system) for the staffing of schools in the compulsory sector. A review of the formula will be undertaken to remove anomalies.
6. Present government policy will be continued in regard to independent schools.
7. The Private Schools Conditional Integrated Act will be reviewed to update it for the present circumstances.
8. The integrated teaching service with a unified pay system will be pursued with vigour.
9. The Ministerial Schools Consultative Group process on workload will be carried through.
10. There will be a review (carried out in the first year of the term of the Government) of the decision-making structures of the compulsory sector to examine the feasibility of regional structures with a view to modifications which will reduce workloads of principals and Boards of Trustees.
11. Establish a Maori Education Commission to monitor progress in Maori education and design initiatives to graft on to mainstream departments. [Vote: Maori Affairs]
12. There will be a review of the Education Review Office to ensure an audit/monitoring system for schools that best serves the needs of the modern education system.
13. To maintain quality, the Government will move to introduce Education Review Office reviews of homeschooling.

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goed until the Treasurer finishes reading the Budget speech to Parliament on 26 June 1997

/yatt Creech
er of Education

rian Donnelly
iate Minister of Education

lick Smith
iate Minister of Education

MAKING THE DIFFERENCE FOR EDUCATION

ing our young people are prepared for the years ahead is the key goal of the long-term ment being made in education, Education Minister Wyatt Creech said today.

oving education outcomes is a key factor in ensuring New Zealand's economic and social ess. We want people to make the most of their education."

ives launched in this Budget include more than half-a-billion dollars of additional education g over the next three years, with further spending to be announced in the next two Budgets.

er $120 million will be spent in 1997/98 to build more schools and classrooms and other school ies.

l education spending in this year's Budget climbs to almost $7 billion (GST inc.) in the 1997-98 tal year. That's almost a 7 percent increase on last year.

Budget will help provide an education environment where students can achieve regardless of backgrounds and where schools can be confident about the future.

substantial additional funding will meet the growing demand for education. It will pay to se the number of teachers in our schools and give them the skills to ensure each and every nt makes the most of their educational opportunities." Mr Creech said.

ation Highlights in Budget '97

Total education spending of close to $7 billion (GST inc.) this year.

the Next Three Years:

$150-$200 million more set aside for ***Phase Two of Special Education 2000*** for students with very high and high ongoing needs, including those with severe behavioural difficulties or speech and language difficulties.
$61.7 million more will fund an increase in school **Operations Grants** to help schools run better - including $10.5 million more for schools from low socio-economic areas.
A further $36.2 million will expand existing initiatives and develop new ones to **boost the ranks of the teaching workforce** to respond to increased demand for education.
Initiatives to provide classroom teachers with additional skills and training. $40.8 million has been earmarked specifically for this **teacher professional development.**
Schools having difficulty providing a good education receive $30 million of extra investment to help **strengthen and support the education** they provide.
Workload pressures should also be eased with the establishment of a new scheme to help small schools pool their talents to **reduce administration and management pressures.**
An extra $13.3 million will give teachers more **training in the National Qualifications Framework** and improve its implementation.
An additional $6.0 million will pay for **extra classroom resources to help teach the curriculum and assist its implementation.**
An extra $5.7 million will enhance English language tuition for students from **non-English speaking backgrounds.**
Initiatives to help **ease teacher workload.** The Budget will help fund solutions as they are developed.
The Government will ensure the **Unified Pay System** and **Integrated Teaching Service** are adequately funded.
An extra $55.3 million will be invested in **early childhood education** to provide quality services and to increase accessibility.
Tertiary institutions will receive additional funding to the tune of $9.9 million to help **students with disabilities** further their education.
Initiatives designed to reduce **truancy** problems in schools will be extended and improved with new investment of $9.7 million.
An extra $3 million will be spent to further **drug education** in schools.
The **Books in Homes** scheme run by the Alan Duff Charitable Foundation will receive an additional $900,000.
The planned 1.3 percent funding cut for tertiary tuition subsidies in 1998 has been reduced.

In addition to the half-billion-dollars of extra operational spending, the Government will invest substantial sums to build new schools and classrooms.

- An extra $120 million in the 1997/98 financial year alone will help build nearly 1000 new classrooms and ten new schools.

"The new spending represents the beginning of what will be a substantial increase over the next three years.

"This Budget will make a real difference for schools, teachers and students by building confidence and certainty and putting investment in the right areas." Mr Creech said.

Ends

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